

STATE OF INDIANA

Request for Services 9-61

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OVERVIEW

The purpose of this RFS is to solicit proposals for the purpose of hiring a contractor(s) to provide consulting services to guide and assist the State in: 1) a review of Indiana's existing Medicaid Management Information System (MMIS) for upgrade or replacement, 2) a review of existing business practices, policies and procedures within FSSA, including all pertinent systems and initiatives that impact the Indiana MMIS 3) developing business and technology needs to help the State meet its goals with the Indiana MMIS, and 4) writing a subsequent RFS and facilitating the process to procure a contractor(s) to design, develop, and implement a new Indiana MMIS.

The intent of this RFS is to award a contract to that Respondent whose proposal, conforming to this RFS, is most advantageous to the State. However, the State reserves the right to separately procure individual requirements that are the subject of the contract – either through this procurement, or during the contract term - when deemed by the Secretary of FSSA to be in the State's best interest.

The OMPP intends to obtain the services of an independent consultant who is able to complete a comprehensive analysis of the current MMIS. The updated or replacement MMIS is expected to offer more efficient claims processing and maintenance capabilities, lower programming costs in the long run, more effective and useful reporting, monitoring and data projection, increased payment accuracy, and better customer service to both clients and providers. Ultimately, Indiana would like to enhance or replace the MMIS to include improved functionality for providers and State staff and better meet the State's business and strategic objectives.

The Office of Medicaid Policy and Planning (OMPP) has previously conducted a Medicaid Information Technology Architecture (MITA) self-assessment. The assessment report is included in the Bidder's Library for this RFS and is available for respondents to review. A primary objective of the RFS will be to assist OMPP with moving along the established road map as completed during the self-assessment. OMPP expects the Contractor to be knowledgeable regarding compliance with the newly adopted MITA principles and to be able to assist with integrating these principles to the combined functionality RFS (including Pharmacy and Rebate systems). Medicaid goals are to improve health care outcomes for Medicaid beneficiaries, and to ensure the efficient, effective, and economical management of the Medicaid program. The RFS will require that vendors demonstrate familiarity with MITA standards and address opportunities for implementing MITA principles.

OMPP is committed to updating or replacing its existing MMIS on the basis and concepts of the MITA initiative. Due to a variety of factors, including the complexities in replacing the existing MMIS, experiences of other states with comparable Medicaid programs, federal requirements for enhanced funding, and lack of staff needed to undertake a replacement effort on its own, OMPP is seeking the services of a contractor to assist the following initial phases of the project:

Project Phase 1, Planning

OMPP intends to enter into an agreement with a contractor to, with OMPP and FSSA input and assistance, plan and conduct assessments and analysis of the current MMIS, and the State's current business processes, policies, and procedures. The successful contractor will be expected to actively conduct outreach and interviews with Medicaid stakeholders, including but not limited to service providers and provider associations, billers and submitters, health plans (Hoosier Healthwise, Care Select, Healthy Indiana Plan), pharmacy benefit managers, advocacy groups, and State of Indiana staff.

Contractor will use the information gathered from outreach, interviews, and technical assessments to develop options, requirements and recommendations for the replacement of the existing MMIS.

Project Phase 2, Procurement and Implementation Advance Planning Document (IAPD)

The contractor shall be responsible for drafting an IAPD and RFS to help the State of Indiana procure an MMIS solution, as recommended by the contractor following Phase 1. Contractor shall also be responsible for assisting the State in evaluating responses, and eventually selecting a prospective MMIS contractor to design, develop and implement the future MMIS. The IAPD must be approved by CMS prior to publishing the completed RFS. The vendor shall participate in the proposal analysis and contracting process with the selected MMIS vendor(s). By submitting proposals in response to this RFS, Respondents agree that they have the required qualifications and ability to perform the requested services for BOTH phases of the project (Phases 1 and 2). Proposals that only propose services for one phase only will be rejected by OMPP. Respondents also agree that they will remain free of any potential conflicts of interest with relation to the MMIS procurement resulting from Phase 2 of the project. The successful Contractor(s), by virtue of providing consulting services to the State of Indiana under this contract, will be precluded from responding to the upcoming MMIS replacement RFS, either as a prime contractor or as a subcontractor.

Respondents should note that the time frames for the procurement phase are dependent on the successful completion of the planning phase. While OMPP is committed to replacing its existing MMIS in a timely fashion, it will not compromise the planning phase of this project in order to meet arbitrary deadlines. In addition, it is important for respondents to note that State and Federal policies are constantly changing and may alter the requirements of the proposed MMIS and impact the time frames for completing various activities. Therefore, the State is not in a position to provide guarantees related to the specific timing of each phase of the project.

Respondents should also note that there may be gaps between project phases, and that work activities identified in this RFS may not be, or in some cases, cannot be performed consecutively. For example, the contractor may have little or no work to do during the time it takes to finalize the decision on how to replace the existing MMIS or while waiting for various approvals of the required documents.

1.0 DETAILED SCOPE OF WORK

Respondent must identify and describe the tasks and deliverables they will perform during the planning phase of the MMIS project as described below. These tasks and deliverables will be the basis against which contractor's performance will be measured. In order for the State to determine the capabilities of a Respondent to perform the services specified in this Section, Respondents must provide details of their proposed approach by completing the Technical Proposal Response Template (Attachment G) included with this RFS. Brief responses that merely state that Respondent will comply with the requirements are neither adequate nor appropriate; the State is interested in specific details of Respondent's proposed services.

OMPP shall perform oversight for all aspects of the project and be in close contact with the Contractor and CMS. In addition, OMPP will coordinate any activities required of other State agencies and any other relevant business partners. Contractor will also be expected to work extensively with other State and OMPP Contractors, as directed and requested by State personnel.

1.1 DUTIES AND OBLIGATIONS -CONTRACTOR

1.1.1 LOCATION OF CONTRACTOR'S OFFICE

The Contractor may choose to establish a field office in support of the requirements of this RFS. The preferred geographic location of the office site should be within 10 miles of OMPP offices located at 402 West Washington Street, Indianapolis, IN 46024. However, OMPP prefers that Contractor's staff be present on-site in order to facilitate interaction with the State Contract Manager and other relevant State staff. OMPP will provide office space, including furniture and telephones for the Contractor to use while performing work within OMPP. The Contractor must provide its own computers and software.

1.1.2 PROJECT LAUNCH MEETING

The Contractor shall meet in person with OMPP within 10 business days of the contract award date to resolve issues including, but not limited to, the following:

- a) Contractor's work location within OMPP facilities,
- b) Proper methods and channels of communication between Contractor and OMPP,
- c) Developing status reporting mechanisms, and
- d) Modification to the Contractor's project plan and project schedule as submitted with its bid proposal with the modified plan established as the project schedule baseline.

1.1.3 STATUS MEETINGS

Upon request by the State Contract Manager, the Contractor shall hold status meetings with OMPP at OMPP offices to assess progress, review problems, develop solutions, and, in general, to keep the project on schedule and ensure all deliverables are provided.

The Contractor must also prepare and present an overview of project progress for each status meeting and ensure that decisions and recommendations forthcoming from status meetings and/or overview presentations are formally recorded.

1.1.4 WEEKLY STATUS REPORTS

The Contractor must prepare weekly project status reports and submit the weekly reports to the State Contract Manager within two (2) business days of the period covered unless the State Contract Manager determines that the status reports are required on a less frequent schedule. The Contractor shall ensure that the status reports provide detail at activity, task, and subtask levels.

In addition, the reports shall include, but not be limited to the following information:

- a) Gantt chart showing work completed and any other status information specifically requested,
- b) Statement of progress made during the period covered and, as applicable, the impact of delays encountered and schedules not met,
- c) Statement of work accomplished, estimated time to completion per the final project plan submitted at project startup, and variance of planned against actual accomplishments,
- d) Status of each task and subtask in process but not yet completed, including the percentage completed,
- e) If applicable, a list of final form deliverables submitted for management review,
- f) If applicable, a list of deliverables scheduled for completion but not yet submitted in final form for management review, cause of failure, if any, to meet the schedule, a Corrective Action Plan (CAP) and detailed plans identifying remaining work steps,
- g) List of issues and problems encountered, both resolved and unresolved, together with alternative solutions and recommendations for resolution of outstanding issues and problems, and
- h) Updates to the project plan, as applicable.

1.1.4.1 MONTHLY STATUS REPORTS

The Contractor must prepare a monthly project status report and submit the monthly report to the State Contract Manager within three (3) business days of the period covered unless the State Contract Manager determines that the monthly status report is required on a less frequent schedule. The report shall include, but not be limited to the following information:

- a) Overall project status including if the project is on schedule and within the project milestones and scope,
- b) Identification of all significant deviations from the project schedule, changes to milestones or scope and the causes and proposed remedies, and
- c) Listing of significant issues and problems encountered, both resolved and unresolved, together with alternative solutions and recommendations for resolution of outstanding issues and problems.

1.1.4.2 CORRECTIVE ACTION PLAN (CAP)

Upon request by the State Contract Manager, the Contractor shall develop a CAP to address any performance failures or problems. The Contractor must submit the CAP to the State Contract Manager within 10 business days of either its, or the State Contract Manager's, identification of performance failures or problems. The Contractor shall ensure that the CAP includes, but may not be limited to, the following:

- a) Identification of any interim actions needed to be taken to prevent the performance failures from causing more damage,
- b) Identification of the cause of the problems and the detailed corrective actions to be taken to prevent recurrences,
- c) Assignment of individuals responsible to take or oversee the performance of the corrective actions,
- d) Description of the verification method to be used to monitor each corrective action taken to ensure prevention of recurrence of the performance problems,
- e) CAP schedule that includes the corrective action tasks, staff responsible, time frames including expected completion dates, and review points to determine the effectiveness of the actions taken, and
- f) Facility to revise or expand the CAP if the initial CAP as implemented determines the cause of the problems has not been eliminated or the performance failures reoccur.

1.1.5 SOFTWARE UNIFORMITY

The Contractor shall ensure uniformity with OMPP's standard software and versions; such software includes, but is not limited to the Microsoft family of products (Word, PowerPoint, Excel, Access and Project) and Adobe Acrobat.

The Contractor shall also provide copies for state use of all other software that it proposed to use within its bid proposal.

1.1.6 SET-UP DOCUMENTATION REPOSITORY/PROJECT FILES

The Contractor must create a project document filing and repository system housed on an OMPP server. The documentation repository shall serve as the primary access point for completed tangible results for each task, including deliverables, and must be accessible immediately and in real-time by the OMPP Project Manager. The Contractor shall ensure the documentation repository is logically organized, wherein each section contains the completed task documentation. Project files must be established to hold administrative information regarding budget, schedule, and project progress as well as any other correspondence, reports, or project-related information.

1.1.7 DATA SAFEGUARDS

The Contractor must ensure that all data is safeguarded in accordance with State and federal statutes, regulations, and policies pertaining to the confidentiality of beneficiary information.

Such statutes, regulations, and policies include, but are not limited to, the Health Insurance Portability and Accountability Act (HIPAA) of 1996 and the Balanced Budget Act (BBA) of 1997 governing the protection of patient information.

1.1.8 AUDIT AND ACCESS TO RECORDS

At all times during the period that the contract is in force, and for a period of not less than three years thereafter, the Contractor shall provide all authorized representatives of the State government with full access to all of the Contractor's financial, data, and other records that pertain to services performed under the contract, including access to appropriate individuals with knowledge of such records and full access to all additional records that pertain to services performed under the contract, permitting such representatives to examine, audit, and copy such records at the site at which the records are located, at no cost to the State. Such access/audit shall include both announced and unannounced inspections and on-site audits.

1.1.8.1 AUDITS

Audits conducted under this provision shall be in accordance with generally accepted auditing standards and within established procedures and guidelines of the reviewing or auditing agency or agencies.

Audit access applies to records pertaining to all contracts, all contract change orders, and all contract amendments resulting from the award of this RFS. In addition, this right to access applies to all records pertaining to all contracts, additional work clause items, and contract amendments including those of any subcontractor(s):

- a) To the extent records pertain directly to contract performance,
- b) If there is any indication that fraud, gross abuse, or corrupt practices may be involved, and
- c) If the contract is terminated for default or for convenience.

If an audit, litigation, or other action involving records is started before the end of the contract period, or extension(s) thereof, the records must be retained until all issues arising out of the action are resolved or until the end of the contract period, whichever is later.

Copies of any contract-related documents in Microform or digital image capture technology may be substituted for the originals with the prior written approval of the OMPP, provided that the copying procedures are accepted by the OMPP as reliable and are supported by an adequate retrieval system.

1.2 UPDATE OF PROJECT PLAN

As the Contractor moves forward in its review of the existing MMIS, operations, and documents, it shall update its Project Plan and provide the updated Project Plan to the State Contract Manager each week and upon request by the State Contract Manager for approval. The Contractor shall ensure that the Project Plan reflects all changes to federal and State policies related to proposed MMIS requirements.

2.0 PROJECT PHASE 1 - PLANNING

2.1 REVIEW OF CURRENT MMIS, OPERATIONS, AND DOCUMENTS

As directed and identified by the State Contract Manager, the Contractor shall meet with FSSA and OMPP personnel to review operations and systems which perform functions that are considered part of an MMIS pursuant to MITA. Throughout this scope of work, references to MMIS include functions performed by other systems within the State which are considered part of an MMIS pursuant to MITA. The scope of Contractor's review shall include a comprehensive assessment of all existing systems within FSSA, and the various programs and subdivisions within the agency, that interface with the MMIS. Contractor will be expected to study their impact on, and interactions with, the MMIS.

The Contractor shall also perform a review of documents related to the existing MMIS, operations, and legal requirements. Such documentation includes, but is not limited to:

- a) MMIS project intent and scope as defined within the Advance Planning Document (APD) requirements of CMS,
- b) Requirements as defined within this RFS,
- c) Federal rules and regulations pertaining to MMIS systems,
- d) Medicaid program policy/procedures manuals,
- e) Latest version of the MITA Framework Document Initiative and MITA Technology Standards as reflected on the CMS website,
- f) HIPAA rules and regulations,
- g) Certification of Medicaid system regulations, including the MMIS Certification Toolkit,
- h) Organizational structure of the existing MMIS as related to various State agencies and other external entities,
- i) Medicaid program statistical information such as caseloads, claims (paper/electronic), prior authorization requests,
- j) Internal/external data sources, and
- k) Applicable Indiana statutes, regulations and codes.

Upon completion of document reviews and interviews, the Contractor will make recommendations where necessary to OMPP regarding operations, policies, and documentation.

2.2 IDENTIFICATION OF GOALS AND OBJECTIVES

In consultation with the State Contract Manager, the Contractor must schedule and facilitate meetings with key stakeholders to identify and prioritize the State's Medicaid goals and objectives. Such stakeholders shall include, but not be limited to service providers and provider associations, billers and submitters, health plans (Hoosier Healthwise, Care Select, Healthy Indiana Plan), pharmacy benefit managers, advocacy groups, and State of Indiana staff. The State intends for the Contractor to play a leading role in assessing Indiana Medicaid's business and strategic goals and objectives. Contractor(s) should not expect to merely comply with instructions and directions from State staff or anticipate that goals and objectives are clearly defined as of the issuance of this RFS. The State intends for this to be an ongoing process in partnership with the Contractor. The State is expecting Contractor(s) to provide significant industry expertise resulting in thoroughly researched recommendations.

The goals and objectives developed through this process will be utilized as a guide for selecting new business and technical capabilities. Prioritization of the goals will be a function of OMPP, but the Contractor must provide recommendations to the State for evaluation during the prioritization process. The Contractor shall ensure that each goal is articulated to a level of detail necessary to identify specific outcomes and performance measures.

The Contractor shall develop a written report format to list and prioritize the State's goals and objectives and submit this report format to the State Contract Manager for approval prior to submitting the final report. The Contractor shall provide the State Contract manager with a final report on the State's Medicaid and MMIS goals and objectives, in the approved report format, within one (1) week after the completion of the last meeting on this matter.

2.2.1 ADDITIONAL INDIANA MEDICAID PRIORITIES

OMPP is also interested in addressing specific priorities that are critical to the future direction and vision of the Indiana Medicaid program. To this end, Contractor shall incorporate the following objectives into the overall Project Plan:

- Collaboration with health information exchange and health information technology efforts, and the Indiana Health Informatics Corporation, to accelerate the development and adoption of electronic data sharing initiatives for Medicaid.
- Ensuring that a Decision Support System (DSS) will be part of the overall solution for the next generation MMIS. Planning for the DSS shall include recommendations on structuring the DSS, the timing, and how to integrate into the overall framework.

2.2.2 INTEGRATED MEMBER INFORMATION STRATEGY

As part of the Contractor's analysis, the Contractor shall propose a strategy to integrate the view of a Medicaid member. This integration strategy shall include:

- Member information for inclusion as part of the MMIS Member Management
- Member information appropriate for the Medicaid Decision Support Systems
- Appropriate interface and integration strategy between Member Management and other systems, which utilize member information such as eligibility determination systems

This information strategy shall be incorporated into the overall Project Plan.

2.3 GAP ANALYSES

2.3.1 TECHNICAL GAP ANALYSIS

The Contractor shall develop a Technical Gap Analysis methodology that ensures that OMPP is provided with a detailed understanding of gaps that exist between the current MMIS technical architecture and technical architecture needed to achieve both short- and

long term goals for each business process and its respective, associated replacement module.

In addition to grouping the Technical Gap Analysis into replacement modules, the Contractor shall ensure that the Technical Gap Analysis is based on the seven MITA portfolios of:

1. Interoperability,
2. Data Management,
3. Data Sharing and Coordination,
4. Security and Privacy,
5. Adaptability and Extensibility,
6. Performance Measures, and
7. Business Area Improvement.

In order to obtain the technology to serve the short-term and long-term business needs, the Contractor shall ensure that the Technical Gap Analysis is broad-based and goes beyond a simple inventory of the existing MMIS hardware/software components. The Contractor shall ensure that its Technical Gap Analysis includes, at a minimum:

a) Identifying the technical architecture of the existing MMIS, this includes, but is not limited to:

1. Configuration (hardware, software, work stations, etc.) utilized in the existing MMIS,
2. Mechanisms, internal and external, to OMPP for system-to-systems communications including use of the Internet,
3. Data currently used in the existing MMIS,
4. Current collaborative agreements for sharing data from the existing MMIS,
5. Current security and privacy mechanisms utilized in the existing MMIS, and
6. Current standards and policies governing the existing MMIS.

b) Mapping components of existing MMIS to each replacement module to include:

1. Identifying the actual hardware and software components for each replacement module,
 2. Identifying both the internal and external exchange of information for each replacement module,
 3. Identifying the data associated with each replacement module, and
 4. Identifying the security and privacy regulations affecting the data associated with each replacement module.
- c) Once the Technical architecture of the existing MMIS has been identified and grouped into replacement modules, the Technical Gap Analysis must at a minimum describe:
1. Technical architecture needed to achieve the level of MITA maturity identified as the short-term goal for each replacement module,
 2. Technical gaps that exist in the existing MMIS to the technical architecture needed to achieve the level of MITA maturity identified as the short-term goal for each replacement module,
 3. Technical architecture needed to achieve the level of MITA maturity identified as the long term goal for each replacement module, and
 4. Technical gaps that exist in the current MMIS to the technical architecture needed to achieve the level of MITA maturity identified as the long term goal for each replacement module.

2.3.2 BUSINESS GAP ANALYSIS

Contractor shall confirm and update the “As-Is” and “To-Be” assessment results based on current goals and objectives. Using the updated “As-Is” and “To-Be” assessment results, and using the Goals and Objectives identified in Section 2.2 above, the Contractor shall create a written Business Gap Analysis that addresses what needs to occur to move each replacement module and associated business processes from its “As-Is” state, up on the MITA maturity scale, to the level determined in the “To-Be” assessment. The written Business Gap Analysis shall include, but not be limited to:

- a) Description of each business process either currently in use or planned for implementation along with the current status of each business process,
- b) Description of the conclusions that have been reached in regard to the short and long term goals of each business process,
- c) Description of the actions necessary for each business process to progress to the next and subsequent MITA maturity levels,

- d) List of the replacement modules with each business process assigned to one of the modules,
- e) List of the replacement modules that includes a ranking, from top to bottom, of the replacement priority of each module and the rationale for the ranking,
- f) Description of the impact on State staff for each replacement module, and
- g) Description of any necessary follow-up.

2.4 REQUIREMENTS PLANS

Upon completion of “As-Is” and “To-Be” Assessments, the Contractor must determine all requirements necessary to fill the gaps between the current, short-term and long-term needs of the existing MMIS through the creation of Business Process Requirements and Technology Requirements Plans.

2.4.1 BUSINESS PROCESS REQUIREMENTS PLAN

The Contractor shall identify requirements necessary to fill business gaps between the current and planned business processes through creation of a Business Requirements Plan that expands on the Business Gap Analysis to detail the requirements to move existing MMIS from its “As-Is” state to the short-term and long-term goals of the “To-Be” assessment (as identified in Section 2.2 above). The Business Process Requirements Plan will identify each individual business process in addition to grouping the business processes into the replacement modules. The Contractor shall ensure that the Business Requirements Plan includes, but is not limited to:

- a) All business processes identified in the Business Gap Analysis,
- b) “As-Is” status of each of these business processes,
- c) Short-term “To-Be” goal of the business process,
- d) Long-term “To-Be” goal of the business process,
- e) Gaps that exist between “As-Is” status and “To-Be” goals;
- f) Requirements for filling business process gaps, to include changes to the business process, changes in staffing, including any required skills transfer, and changes in policy,
- g) Identify each replacement module,
- h) Requirements for filling the replacement module gaps, including but not limited to:
 - 1. Changes to business processes included in the replacement module,

2. Evaluation of current staff levels and skills, number and type of staff, knowledge and skills required for new MMIS, and any training needed for OMPP staff for each replacement module, and
 3. Changes in policy required for each replacement module, and
- i) Detail the business requirements needed for filling the gaps, including but not limited to, the following requirements:
1. Security,
 2. Correspondence and electronic communication,
 3. Imaging and document management requirements;
 4. System and data auditing, and
 5. Disaster recovery and business continuity.

2.4.2 TECHNOLOGY REQUIREMENTS PLAN

The Contractor shall identify requirements necessary to fill gaps between the current technology and the technology required to effectively implement, and ultimately operate, the changes identified in the Business Process Requirements Plan. The Contractor shall create a written Technology Requirements Plan classed by replacement module, which provides:

- 1) Detailed technical requirements for filling the short-term gaps between the current and planned technical architecture and
- 2) Detailed technical requirements for filling the gaps between the planned short-term technical architecture and the long-term technical architecture.

Detail information for the plan shall include, but not be limited to, the following requirements:

1. Desktop environment,
2. Web/Internet,
3. Security requirements,
4. Data retention, archival and purge,
5. Correspondence and electronic communication,
6. Imaging and document management,
7. System and data auditing,

8. Database administration,
9. Disaster recovery and business continuity,
10. System integration,
11. Integrated testing facility,
12. Network connectivity,
13. General data interface requirements,
14. Access, display and navigation requirements,
15. User alerts standards and requirements,
16. Ongoing federal compliance requirements:
 - Health Insurance Portability and Accountability Act (HIPAA)
 - Clinical Laboratory Identification Association (CLIA)
 - Medicaid Statistical Information System (MSIS)
 - Medicare
17. Integrated voice response (IVR) requirements,
18. Data warehouse requirements,
19. Recommended hardware platforms, and
20. Evaluation of existing MMIS staff levels and skills, number and type of staff and knowledge and skills required for the future MMIS, and any training needed for OMPP staff for each replacement module.

2.5 MMIS REPLACEMENT OPTIONS -ANALYSIS AND RECOMMENDATION

Following the completion of tasks outlined in Sections 2.1 through ~~2.5~~ 2.4.2 above, and taking into consideration Indiana Medicaid goals and objectives, the Contractor shall develop a list of options for replacing the current MMIS, along with its recommendation for such replacement. Should the Contractor determine that the planning process to this point is lacking or incomplete, the Contractor shall provide a written proposal to the State Contract Manager of all additional planning activities, which the Contractor has identified as being necessary, to ensure that all areas of risk or concern are addressed.

2.5.1 REPLACEMENT OPTIONS

The Contractor shall develop a preliminary list of viable solutions to replace the existing MMIS. In developing its list, the Contractor shall ensure that it has considered short-term and long-term goals of the proposed MMIS and that all custom systems slated for inclusion on the preliminary list are based upon state-of-the-art technologies. The Contractor shall further ensure that it has considered a wide scope of replacement options, including, but not limited to:

- a) Building a complete custom system,

- b) Obtaining a Contractor(s) to build the various replacement modules of the MMIS,
- c) Outsourcing of the proposed MMIS, either in whole or by replacement module,
- d) Transfer of a system, in whole or by replacement modules, from another entity and modifying them to meet the requirements of the proposed MMIS,
- e) Partnering with another state or states to transfer, in whole or by replacement module, an MMIS solution which has been modified, as needed, to meet the requirements of the proposed MMIS,
- f) Obtaining a fiscal agent, and
- g) Other proven industry solutions.

The Contractor shall ensure that all solutions on its preliminary list include comparison of the solutions based upon the previously completed assessments (“As-Is” and “To-Be”), Gap analyses (Business and Technical), requirements plans (Business Process and Technology). The Contractor shall also identify the advantages and disadvantages of each respective solution, in relation to one another. The Comparison Matrix must also identify all states that have replaced a MMIS within the past five (5) years, along with the state’s chosen solution. The Contractor shall submit its completed preliminary list to the State Contract Manager for approval. Such approval shall include both the content and the structure and format of the Comparison Matrix and the Replacement Options list.

2.5.2 COMPARATIVE REPLACEMENT ANALYSIS

The Contractor shall develop an analytic framework, including rationale for its methodology, that identifies and quantifies the strengths, weaknesses, and risks for each solution (from the preliminary list) identified by the State Contract Manager as a potential MMIS replacement alternative. Contractor must note that the State may or may not choose to select a subset of options from the preliminary list for further analysis.

The Contractor shall ensure that its analytic framework includes capture of data necessary for subsequent use in cost-benefit analyses and comparison of risks inherent with each primary alternative. The Contractor must submit the analytic framework to the State Contract Manager for approval prior to performing analyses.

The Contractor shall perform analyses of the primary alternatives that include, but are not limited to:

- a) Assessment of meeting both short-term and long-term business needs,
- b) Design, development, and implementation timelines for each alternative,
- c) Whether methods, resources, and other Contractors are available to obtain and support the alternatives,

- d) The extent to which each alternative improves services to clients and providers,
- e) Total number of State staff required for each alternative and the staff skill requirements for each alternative,
- f) Scale and level of administrative manageability of each alternatives,
- g) Scale and level to which each alternative links accountability to responsibility,
- h) Based upon market analysis, whether other states with Medicaid programs similar to OMPP (states with Medicaid populations close to that of OMPP) recently chose any of the alternatives and a detailed analysis of the outcomes of those decisions,
- i) Based upon market analysis, whether successful, and the degree of success, that any other states with MMIS of comparable size and complexity utilized any of the alternatives in replacing their MMIS,
- j) Flexibility of change management procedures, and
- k) Any other criteria identified by the Contractor or the State Contract Manager to be included in the analytical framework.

2.5.3 COST BENEFIT ANALYSIS

The Contractor shall develop a cost benefit analysis that uses information from other states to calculate the Return On Investment (ROI) for each primary alternative. The Contractor shall ensure that information used in cost estimates is based in part on information derived from research into other states with Medicaid programs similar to OMPP, in terms of claims processed and clients served, and completed MMIS procurements within the past 3 to 5 years. The Contractor shall ensure that the cost benefit analysis of the each primary alternative includes, but is not limited to:

- a) Analysis of DDI cost, projected 5 and 10 year operational costs, comparison of these costs for each alternative to current MMIS projected costs,
- b) Analysis of benefits,
- c) ROI,
- d) Impact on staffing,

- e) Funding source analysis,
- f) Risk analysis,
- g) All data needed for all CMS required documents, including the Advanced Planning Document (APD), and
- h) Other factors identified by the Contractor or State Contract Manager.

2.5.4 RECOMMENDATION DOCUMENT

Using the body of work created by the Contractor, the Contractor shall develop a written recommendation for replacing the existing MMIS. The Contractor shall ensure that its recommendation document includes, but is not limited to:

- a) Recommended approach for replacing the existing MMIS;
- b) Detailed analysis of State staffing requirements including training;
- c) Cost benefit analysis;
- d) All operations cost savings;
- e) All tangible benefits;
- f) Risks associated with the recommendation;
- g) All alternative factors to be considered;
- h) Number and type of the RFS(s) necessary to implement the recommendation;
- i) Estimated timeframe for implementation.

2.6 IMPLEMENTATION ADVANCED PLANNING DOCUMENTS (IAPD)

The Contractor must develop an Implementation Advance Planning Document (IAPD) in accordance with CMS requirements and standards. The Contractor must submit the IAPD to the State Contract Manager for approval.

2.7 CAPSTONE REPORT –FINAL STEP 1

The Contractor shall provide the State Contract Manager with a preliminary written Capstone Report of its findings and recommendations resulting from its efforts up through Section 2.5 of the RFS for the State Contract Manager's approval. This

preliminary report must be submitted for approval at the same time as the IAPD described in Section ~~2.7~~ 2.6.

The Contractor must provide at least six (6) loose-leaf copies of the preliminary report in letter-sized format. The State Contract Manager shall have a period of ten (10) business days to review the preliminary report, ask questions, and ask for any changes and clarifications prior to the submittal of a capstone final report.

Upon approval of its preliminary Capstone report, the Contractor must prepare and submit six (6) bound copies of the Final Capstone Report within ten (10) business days. This report will detail Contractor's findings and recommendations resulting from its review, update, and augmentation of the Master Plan. The Final Capstone Report must be produced in letter-sized format. In addition, the Contractor shall also provide a copy of the final report on CD-ROM in a format to be specified by the State Contract Manager.

2.7.1 PRESENTATION OF FINAL CAPSTONE REPORT

The Contractor must present its findings and recommendations, as detailed within the final capstone report, in an oral presentation for OMPP and other interested, relevant parties. The Contractor shall perform its presentation at a location, and on a date and time specified by the State Contract Manager. OMPP shall provide meeting space for the presentation. The Contractor must include in its oral presentation an open question and answer period.

3. PROJECT PHASE 2 - PROCUREMENT AND SELECTION OF MMIS CONTRACTOR

3.1 DRAFT REQUEST FOR INFORMATION (RFI) FOR PROJECT PHASE 2

The State reserves the right to request an RFI. If the OMPP Director and/or State Contract Manager decide that an RFI is not needed, Contractor will be expected to move forward directly with procurement of the MMIS.

Upon request by the OMPP Director and/or State Contract Manager, the Contractor shall draft a Request for Information (RFI) to solicit feedback from relevant parties, including but not limited to: potential MMIS vendors, Medicaid providers, provider associations, billers and submitters, State agencies, Medicaid beneficiaries, and advocacy groups. The Contractor must submit the RFI to the State Contract Manager for approval. As the State anticipates that the RFI will be a draft of the Request for ~~Proposal~~ Services (RFS), the Contractor must also identify and define questions and issues for which the State desires feedback.

The Contractor shall review all RFI responses and prepare a written report that analyzes and summarizes each RFI response. The Contractor shall ensure that its report includes recommendations regarding the applicability of the RFI responses for inclusion in the final RFS. The Contractor must submit its report to the State Contract Manager for approval.

3.2 PROCUREMENT OF MMIS

Based upon OMPP's decision how to best replace the existing MMIS, and pending any feedback received through the RFI process detailed in Section 3. 1, the Contractor shall draft one or more Requests for Services (RFS) to procure the design, development, and implementation of the future MMIS through the State's open, competitive bidding process.

The Contractor must ensure that the RFS(s) complies with all State and Federal procurement regulations, is designed to secure the benefits of free and open competition, and maximizes competition by focusing on the specifications of functional requirements rather than identifying a particular application and/or platform solution. For payment purposes, an RFS is a final approved RFS ready to be advertised, not a draft RFS. The Contractor's work shall include development of the technical components of the RFS and advice related to the type of work requested in the RFS. OMPP will provide the RFS terms and conditions in a standard template, similar to the terms and conditions in this contract.

The Contractor's input to the RFS must be clear and understandable to the State and bidding community and must address all State standards. The development of the RFS requires that the Contractor work with the appropriate State staff, which may include members from OMPP, FSSA, Indiana Department of Administration, and other State departments or agencies. Any queries in this regard shall be directed to the State Contract Manager.

3.2.1 PROCUREMENT ASSISTANCE: KICK-OFF MEETING

Within ten (10) business days of receiving written direction from the State Contract Manager to proceed with procurement activities, the Contractor shall meet with the State procurement assistance team to present its MMIS procurement plan. At this meeting, the Contractor shall provide the State Contract Manager with a disclosure of its business relationships with any firms that may bid. It shall be the responsibility of the OMPP to determine if a business relationship represents a conflict of interest. Within three (3) business days of the conclusion of the kick-off meeting, the Contractor shall prepare a memorandum that documents the meeting. The State Contract Manager may cancel the kickoff meeting and proceed without this meeting if the State determines that all the activities in developing the MMIS procurement plan would make a kickoff meeting unnecessary.

3.2.2 PROCUREMENT ASSISTANCE: RFS PREPARATION

The Contractor shall prepare RFS documents that comport with the results of the RFI (if any), Contractor findings, and the decision of the State on how to best replace the existing MMIS and proceed in accordance with the approved MMIS procurement plan. The State will provide the Contractor with the standard terms and conditions sections and any other information deemed to be necessary. The Contractor shall provide the following, including but not limited to:

- a) **Purpose and Intent/Overview and Background:** The Contractor shall prepare a purpose and intent of the RFS. The Contractor shall prepare an overview and background section to provide bidders with a brief history of events that led to the need for this RFS. The Final Capstone Report (or relevant sections thereof) submitted in accordance with Section 2.7 of this RFS may be referenced as supporting information and provided to potential bidders as background information as determined by the State.
- b) **Scope of Work:** The Contractor shall prepare a scope of work that includes all technical specifications, schedules, directions, work locations, equipment, health and safety standards, and deliverables. Long and detailed technical specifications shall be provided in technical appendices that are cross-referenced in the scope of work. The scope of work shall include, but is not limited to, the following:
- Minimum standards for equipment
 - Minimum performance standards
 - All technical specifications developed in the Final Capstone Report, unless changes are submitted to, and accepted by, the State Contract Manager
 - CMS quality standards
- c) **Technical Definitions:** The Contractor shall provide standardized definitions to technical terms to be used throughout the RFS.
- d) **Cost Proposal section and supporting detail:** The Contractor shall help the state in structuring the deal and recommended pricing options. The Contractor shall provide a detailed Cost Proposal section to accompany the RFS that is understandable and acceptable and will fairly compensate the winning Contractor, while allowing the State Contract Manager to hold said Contractor accountable for work performed. The Cost Proposal shall have a calculated total bid price. Any price lines that are not unit prices shall be supported with information on the level of effort the bidder should propose in support of those prices. The supporting detail of prices shall include quality and quantity of resources required to perform the work. The Cost Proposal line items shall be clearly linked to Scope of Work sections so that bidders understand the relationships between work to be performed and prices bid. Any incentives and/or penalties tied to performance shall also be clearly specified in the Cost Proposal.
- e) **Explanation of Cost Proposal:** The Contractor shall prepare a written section in the RFS that explains every price line, the unit of measure, and the work that must be performed in order to be eligible for payment.

- f) **Payment** – The Contractor shall prepare a section on payments. This section shall discuss the frequency of payment to the implementation Contractor and the supporting documentation that the implementation Contractor must submit to support its invoice (e.g. payroll records, number of inspections). The RFS shall discuss the State Purchase Order process and the submission of State Payment Vouchers. If the implementation Contractor is to collect fees, the RFS shall have a section to discuss the method of collection of those fees, the cash flow from those fees, accounting controls, record keeping, reporting, and any other financial control that the implementation Contractor must maintain in a fee-based system. Such controls must be specified in any RFS that requires the implementation Contractor to handle money on behalf of the State.
- g) **Funding Source/Fees** – The Contractor shall prepare a report on the sources of funds that may, at the State's option, be included in the RFS. The State Contract Manager shall provide the Contractor with this information. If fees are to be collected by the MMIS implementation Contractor, the planning Contractor shall prepare a complete discussion on the collection of fees as noted above in Payment.
- h) **Insurance** – The Contractor shall provide recommended minimum levels of insurance that the implementation Contractor must have and specifications for that insurance.
- i) **Bonds** – The Contractor shall advise the State on the need for the implementation Contractor to be bonded and the suggested amount of those bonds. The bonds could be, but are not limited to, bid bonds, performance bonds and/or subcontractor payment bonds.
- j) **Contract Duration** – The Contractor shall advise the State on its recommended duration of the contract and provide a justification for that contract duration.
- k) **Contract Extensions** – The Contractor shall advise the State as to the advisability of contract extensions.
- l) **Price Escalations** – The Contractor shall advise the State on whether and how to incorporate price increases over the term of the contract, particularly if the contract term is longer than three (3) years. The Contractor shall provide a section on the approach to those price escalations and how those escalations will be specifically determined and applied over the term of the contract extension.

- m) **Licenses and Permits** – The scope of work shall include a section on licenses and permits that specifies the licenses, permits, and registrations that the implementation Contractor or its staff must hold.
- n) **Minimum Qualifications and Experience** – The Contractor shall determine if bidders should have minimum qualifications or experience in order to be eligible to bid. Contractor shall advise the State on the qualifications and prepare a section detailing them for inclusion in the RFS, at the State's discretion. Minimum qualifications shall be developed for the implementation Contractor's staff.
- o) **Retainage** – The Contractor shall advise the State on whether or not the State should withhold retainage on any payments due the implementation Contractor and when such retainage should be paid.
- p) **Transitions** – The Contractor shall provide for specifications on transitions between contracts. This includes an initial mobilization transition at the beginning of the contract and a demobilization transition at the end of the contract.
- q) **Proposal Preparation and Submission** – The Contractor shall delineate the requirements for bid submission. The Contractor shall specify minimum qualifications and experience requirements for bidders to be eligible for contract award. The Contractor shall specify minimum qualifications for the bidder's personnel, require the bidder to supply documentation of experience and qualifications, and specify any equipment that the bidder must provide. All the aforementioned requirements shall be subject to approval by the State Contract Manager.
- r) **Bid Submission** – The RFS shall solicit a number of required bid documents. These documents shall include the qualifications and experience of the bidder and the bidder's staff. The RFS shall require the bidder to discuss its approach to perform the services outlined in the scope of work and require the bidders to submit specialized information, such as any special equipment that the implementation Contractor must use to perform work. The Contractor shall advise the State on the information that the bidders must submit and shall prepare those bid submission requirements in writing to be included in the RFS, with State approval.
- s) **Standard State Language and Forms** – The Contractor shall include in the RFS all items required and provided by the State and any other suggested sections or formats that the Contractor may recommend.

- t) **Accountability** – The Contractor shall prepare an RFS section regarding accountability, measures of performance, and appropriate measures to determine non-performance. The performance metrics shall include appropriate measures to reduce payment or impose liquidated damages if the implementation Contractor fails to perform. The Contractor shall also include minimum levels of acceptable performance by the implementation Contractor's staff. The scope of work must specify that the implementation Contractor shall remove those workers from work assignments where those workers deliver substandard service or are the cause of complaints from the public or State Contract Manager. The RFS shall include appropriate mechanisms to allow the State to take action to correct contract non-performance or inappropriate performance that may occur.

The Contractor shall submit all RFS documents to the State Contract Manager for approval prior to each RFS's submission for approval by CMS and final approval by OMPP and FSSA. The Contractor must perform all revisions as necessary in response to OMPP and CMS comments, questions and concerns.

3.2.3 ASSISTANCE IN THE BIDDING PROCESS

The Contractor shall provide technical support to the State Contract Manager and the State procurement assistance team in answering any technical questions that potential bidders may have concerning the requirements in the RFS during the electronic question and answer period and assist the State with any site visits from potential bidders.

The Contractor shall serve as an advisor to the State in the bidding process and may not have any contact with any potential bidders during the bidding and contract award process. All contact with potential bidders will be performed by the buyer assigned to the procurement from the Indiana Department of Administration exclusively through email and issuance of addenda to any RFS.

3.3 PROPOSAL EVALUATION PLAN (PEP) AND ASSOCIATED CRITERIA

The Contractor shall design a proposal evaluation plan (PEP) that describes the overall process, assigns roles and responsibilities, and details evaluation criteria (both technical and cost) that matches the overall objectives of the future MMIS. Most importantly, the Contractor must ensure that evaluation criteria map directly to the RFS requirements. The Contractor must assist OMPP with developing scoring and ranking procedures based on an approved evaluation approach. Such assistance includes, but is not limited to, assigning maximum values to the evaluation criteria, determining the method for assigning points, and developing materials for use by the evaluation team appointed by the State. The scoring methodology must translate the evaluation criteria into a quantitative score for each bidder.

3.4 IMPLEMENTATION CONTRACTOR SELECTION PROCESS

The Contractor shall assist OMPP in selecting the MMIS Contractor to design, develop and implement the proposed MMIS. The Contractor's representatives may not serve as

members of the evaluation committee. Contractor's representative(s) will instead function solely in the capacity of technical advisor as the evaluation committee reviews and evaluates each bid proposal. The State shall ultimately decide on the award of any contract resulting from the RFS.

The Contractor's review of MMIS bid proposals and subsequent recommendations to the evaluation committee, in its capacity as technical advisor, shall include, but is not limited to, evaluation of the following criteria:

- a) How well the proposal meets the functional and business requirements set forth in the Implementation RFS,
- b) How well the proposal meets the requirements of MITA,
- c) Respondent's general and detailed approaches to meeting requirements of the RFS,
- d) Overall project management,
- e) Concordance between the proposal and the Respondent's cost analysis,
- f) Staff credentials;
- g) How well the proposal meets the implementation and development activities as detailed in the RFS, and
- h) Respondent's size, organizational resources, and financial strength to determine the Respondent's overall ability to undertake and successfully complete the project.

The Contractor shall review all proposals as a non-voting evaluation committee member and shall provide comparisons between and among bidders that will assist the evaluation committee in understanding similarities and differences in the bids. The Contractor may be called upon to render an opinion to the evaluation committee on any cost benefit analysis that the evaluation committee undertakes to weigh technical and personnel submissions against the price proposals. The Contractor must also create an Award Recommendation Letter, following the OMPP template, that provides narrative as to the bidding process, scoring of bid proposals, the rationale underpinning the scores of each bid submission, and the recommendation for award. This report shall also include the scores assigned by the Indiana Department of Administration for the Buy Indiana, Indiana Economic Impact, and MWBE scoring components.

In addition, the Contractor shall help the State create written responses to all protests that may result from the award selection. If this work is required, the Contractor will be provided with a copy of the protest and must submit to the State Contract Manager for approval, a budget including but not limited to, identification of Contractor staff, by

name, title, and estimated hours for its response to the protest. For this work the Contractor will be paid at the All Inclusive Firm Fixed Hourly Rate for each respective staff resource as bid in response to this RFS.

4. RESPONDENT QUALIFICATIONS

4.1 ORGANIZATION CHART (CONTRACT SPECIFIC)

The Respondent should include a contract organization chart, with names showing management, supervisory and other key personnel (including any sub-Contractors' management, supervisory or other key personnel) to be assigned to the contract. The chart should include the title of each such individual.

4.2 QUALIFICATIONS OF RESPONDENTS

A qualified Respondent should have organizational and individual staff experience in the following areas or demonstrate the capability to establish a contractual relationship(s) with a subcontractor(s) having such experience:

- a) Expertise and experience in evaluating Medicaid operations, specifically in relation to MMIS, and advising state executives on strategic goals and objectives, taking a forward-looking view, rather than simply evaluating the status quo;
- b) Expertise and experience in advising government agencies on procurement strategies in general and Medicaid related procurement strategies in particular,
- c) Expertise and experience in developing MMIS and Medicaid-related requests for proposal;
- d) Expertise and experience in advising state government agencies on obtaining all available federal funding;
- e) Expertise and experience in analyzing medical information system and medical program decision support system capabilities;
- f) Expertise and experience in advising customers on strategic direction as it relates to technology and information systems;
- g) Expertise and experience in analyzing public benefit eligibility systems;
- h) Expertise and experience in developing evaluation approaches for technical and cost components of requests for proposals that encourage competitive procurements;

- i) Expertise and experience in developing pricing models to employ for the evaluation and selection processes for the contract, fixed price, transaction volume based, cost-plus, etc;
- j) Expertise in advising states on the latest tools and procedures for detecting Medicaid fraud and abuse.

The above qualifications are desirable qualifications that every proposal will be evaluated against. The State is primarily interested in the abilities, prior experience and expertise of the proposed staff, rather than titles and ranks in Respondent's organization.

4.3 RESUMES

Detailed resumes should be submitted for all management, supervisory and key personnel to be assigned to the contract. Resumes should emphasize relevant qualifications and experience of these individuals in successfully completing contracts of a similar size and scope to those required by this RFS. Resumes should include the following:

- a) Identification of the individual's previous experience in completing similar contracts;
- b) Beginning and ending dates should be given for each similar contract;
- c) A description of the contract should be given and should demonstrate how the individual's work on the completed contract relates to the individual's ability to contribute to successfully providing the services required by this RFS; and,
- d) With respect to each similar contract, the bidder should include the name and address of each reference together with a person to contact for a reference check and a telephone number.

4.4 BACKUP STAFF

The respondent should include a list of backup staff that may be called upon to assist or replace primary individuals assigned. Backup staff must be clearly identified as backup staff.

In the event the respondent must hire management, supervisory, and/or key personnel if awarded the contract, the bidder should include, as part of its recruitment plan, a plan to secure backup staff.

4.5 EXPERIENCE OF BIDDER ON CONTRACTS OF SIMILAR SIZE AND SCOPE

The bidder should provide a comprehensive listing of similar contracts that it has successfully completed, as evidence of the bidder's ability to successfully complete the services required by this RFS. Emphasis should be placed on contracts that are similar in size and scope to the work required by this RFS. Of particular interest are Respondent's

experience with business process review and re-engineering, RFS creation, stakeholder management and communications, in a Medicaid and MMIS setting.

A description of all such contracts should be included and should show how such contracts relate to the ability of the firm to complete the services required by this RFS. For each such contract, the bidder should provide two names and telephone numbers of individuals for the other contract party. Beginning and ending dates should also be given for each contract.